

1 MARYLAND DEPARTMENT OF HUMAN RESOURCES

2  
3 REQUEST FOR PROPOSALS  
4 Administration of  
5 Maryland Energy Assistance Program (MEAP)  
6 and  
7 Electric Universal Service Program (EUSP)

8 FIA/OHEP-09-002-S (Re-Bid)

9 \* \* \* \* \*

10 The above-entitled matter came on for a  
11 preproposal conference on Friday, July 10th, 2009,  
12 commencing at 9:44 a.m., at Maryland Department of  
13 Human Resources, 311 West Saratoga Street,  
14 Baltimore, Maryland 21201-3500.

15  
16 AGENCY REPRESENTATIVES:

17 Deborah P. Austin, Procurement Officer  
18 Elsa Singleton, Procurement Officer  
19 James Redditt, Procurement Supervisor  
20 Hemant Patel, Human Service Administrator  
21 Ralph Markus, Director, Office of Home  
Energy Programs

22 Reported by: Sharon A. Beaty, CSR

1 P R O C E E D I N G S

2 MS. AUSTIN: Good morning. Can everyone  
3 hear me?

4 My name is Debbie Austin, Deborah  
5 Austin. I'm the procurement officer for this  
6 solicitation. On behalf of the Department of Human  
7 Resources I would like to welcome you to this  
8 preproposal conference. Today we will share  
9 information with you concerning the request for  
10 proposals for the Family Investment  
11 Administration's administration of the Maryland  
12 Energy Assistance Program, MEAP, and the Electric  
13 Universal Service Program, EUSP. The agency  
14 control number for this RFP is FIA slash  
15 OHEP-09-002-S.

16 If everyone has not already done so,  
17 please sign in in the back. You can leave your  
18 business card on the table. Does everyone in  
19 attendance have an RFP with them?

20 (Affirmative response.)

21 MS. AUSTIN: Everybody is answering.

1                   Please note that Walls Reporting is  
2     recording this conference. When asking questions,  
3     please identify yourself and your company. Please  
4     speak clearly. A transcript of this conference  
5     will be available on the website with your  
6     questions and answers. We will now make  
7     introductions, starting --

8                   MR. PATEL: Hemant Patel, I'm the human  
9     service administrator with the Office of Home  
10    Energy Programs and I will be the contract manager  
11    once it's awarded for this RFP.

12                  MS. AUSTIN: Deborah Austin, procurement  
13    officer for the solicitation.

14                  MR. MARKUS: And Ralph Markus, the  
15    director of the Office of Home Energy Programs.

16                  MS. SINGLETON: Good morning, Elsa  
17    Singleton, Department of Human Resources,  
18    Procurement Division.

19                  MR. CHASE: Good morning. Tyrone Chase,  
20    operations administrator, Shore Up! Incorporated.

21                  MR. VANLANDINGHAM: Good morning, Thomas

1 VanLandingham, director of office home programs for  
2 Shore Up! Incorporated.

3 MR. HOLLAND: Almos Holland, Southern  
4 Maryland Tri-County Community Action Committee.

5 MS. BALZ: Delilah Balz, Southern  
6 Maryland Tri-County Community Action Committee,  
7 Inc.

8 MR. MENIS: Good morning, David Menis,  
9 National Computer Services Consultants,  
10 Incorporated, Baltimore, Maryland.

11 MS. SMITH: Deanie Smith, Washington  
12 County Community Action Counsel, director of  
13 energy.

14 MS. CRABTREE: Jackie Crabtree,  
15 Washington County Community Action Counsel,  
16 transportation director.

17 MR. REDDITT: Good morning, James  
18 Redditt, procurement division.

19 MS. AUSTIN: Thank you. We will have  
20 opening remarks by Mr. Markus.

21 MR. MARKUS: Thank you, Debbie. I would

1     like to, as director of the Office of Home Energy  
2     Programs I would like to welcome you all here and  
3     I'm glad that you do have the interest in our  
4     program. The purpose of this RFP is to deliver  
5     energy assistance services to those literally  
6     thousands of families in Maryland that are in need,  
7     and it's primarily to take and process applications  
8     and provide a benefit to those families, and as we  
9     all know, particularly with the economy being the  
10    way it is, at this point in time we're seeing  
11    increasing numbers of applicants, so it's very  
12    important that we have this contract in place.

13                 I just want to comment to make sure that  
14    you listen carefully and pay attention to the  
15    detail of the RFP. There is a lot of detail in  
16    there and it's important to make sure that  
17    everything is followed basically to the letter.

18                 MS. AUSTIN: Okay.

19                 MR. MARKUS: I'll turn it back to you,  
20    Deb.

21                 MS. AUSTIN: Does everyone have an

1 agenda?

2 MR. CHASE: Yes.

3 MS. AUSTIN: All right. We want to go  
4 to Section 1, the objective of the request for  
5 proposal. It's Section 1.1 of the RFP. The  
6 Department of Human Resources Family Investment  
7 Administration, Office of Home Energy Programs, DHR  
8 slash OHEP, intends to acquire contractual services  
9 for the local administration of the Maryland Energy  
10 Assistance Program, MEAP, and the Electric  
11 Universal Service Program, EUSP. It also includes  
12 the recording of applications for the Utility  
13 Service Protection Plan, USPP. See Section 3 for  
14 additional information.

15 Administration encompasses all  
16 activities related to enrolling persons meeting  
17 eligibility requirements into both programs,  
18 including activities for outreach, intake,  
19 certification for benefits, payments processing,  
20 applicant notification of eligibility determination  
21 and appeal of benefit amount or benefit denial.

1   Proposals are being requested for the eight  
2   Maryland jurisdictions listed below: Calvert  
3   County, Charles County, Howard County, St. Mary's  
4   County, Somerset County, Washington County,  
5   Wicomico County and Worcester County. A single  
6   award shall be made per jurisdiction. Offerors may  
7   submit proposals for more than one jurisdiction.  
8   See Section 4.2. Each contract resulting from this  
9   solicitation will be awarded for a period of four  
10   years and seven months beginning on or about  
11   December 1st, 2009 and ending on or about August  
12   31st, 2014.

13               1.2, Issuing Office. The sole point of  
14   contact in the state for purposes of this RFP is  
15   the issuing office listed below, which is myself,  
16   with all of my information.

17               Ms. Singleton, we're going to go -- I'm  
18   going to do MBE information last, if that's okay  
19   with you, Ralph.

20               MR. MARKUS: Sure.

21               MS. AUSTIN: I think that's going to be

1 more lengthy. So we're going to go through the  
2 hiring agreement with Ms. Elsa Singleton. Ms.  
3 Singleton.

4 MS. SINGLETON: Thank you, Debbie. Good  
5 morning, everyone, and welcome once again to the  
6 Department of Human Resources. I've been asked to  
7 give you some information today about Maryland's  
8 living wage law. That law was effective October  
9 the 1st, 2007 by Governor Martin O'Malley when he  
10 signed that bill into law. The law requires a  
11 payment of a living wage of either \$11.72 per hour  
12 or \$8.81 per hour, depending upon the jurisdiction  
13 where the services are performed. Now, the  
14 Department of Human Resources does not administer  
15 this program, this program is administered by the  
16 Maryland Department of Labor, Licensing and  
17 Regulation.

18 There are two wage tiers established in  
19 Maryland. Tier 1 includes Montgomery, Prince  
20 George's, Howard, Baltimore County, Baltimore City  
21 and Anne Arundel Counties. Tier 2 is comprised of



1 the remaining counties, so the living wage rate for  
2 tier 1 would be the \$11.72 per hour and the rate  
3 for tier 2 would be the \$8.81 per hour. Now, if  
4 your business has operations in areas with two  
5 different wage tiers, the rate you pay is  
6 determined by the area where 50 percent of more --  
7 or more of the services are performed. If the  
8 employees who perform the services are not located  
9 in either tier 1 or 2, the living wage rate will be  
10 based upon where the majority of the recipients of  
11 the services are located. Now, for more  
12 information about Maryland living wage law you have  
13 a green handout that was given to you today, or you  
14 can contact the Maryland Department of Labor,  
15 Licensing and Regulation at 410-767-2394, or you  
16 may visit their website at [www.dllr.state.md.us](http://www.dllr.state.md.us).  
17 And I'd like to continue on right now with the  
18 hiring agreement, Maryland's hiring agreement.

19 So by submitting a bid or proposal in  
20 response to this solicitation you agree to execute  
21 and comply with the Maryland Department of Human

1 Resources hiring agreement. Now, the hiring  
2 agreement provides that the contractor at DHR will  
3 work cooperatively to promote hiring of qualified  
4 entry level Temporary Cash Assistance recipients to  
5 fill entry level job openings resulting from this  
6 procurement, and this is mandated by legislation in  
7 accordance with Section 13-224 of the State Finance  
8 and Procurement Article. And basically you would  
9 identify a number of jobs that you will commit over  
10 the course of the contract. When a vacancy arises  
11 under your hiring agreement contract or when you  
12 are ready to hire a TCA customer, you would notify  
13 the department, and unfortunately the program  
14 director for the hiring agreement isn't with us  
15 today, so I apologize, they can't give you a more  
16 in-depth presentation; however, if you contact with  
17 any questions about the hiring agreement, if you  
18 contact Ms. Austin, and she will get those  
19 questions to Mr. Ingram, who's the program  
20 director, and we will answer them for you. So I  
21 can try to answer any questions about the hiring

1 agreement.

2                   We would like for you to commit a number  
3 of jobs to Temporary Cash Assistance customers;  
4 however, it wouldn't negate your contract if you --  
5 you know, there's no particular amount that you'd  
6 have to dedicate to the hiring agreement, like you  
7 don't have to hire five people, you don't have to  
8 hire ten people, but we would hope that you would  
9 hire some. Are there any questions that we could  
10 possibly take back to Mr. Ingram? Or on anything  
11 else I've said?

12                   MR. CHASE: I do have a question.

13                   MS. SINGLETON: Yes, sir.

14                   MR. CHASE: My question is for positions  
15 that have not yet been filled in the program, the  
16 energy program, do we send advertisements and  
17 submit advertisement information to the Department  
18 of Human Resources for consideration of employees  
19 or is it just those that we identify as positions  
20 for TCA recipients?

21                   MS. SINGLETON: Can we get back to you

1 with a clarification on that?

2 MR. CHASE: Sure can. Absolutely.

3 MS. SINGLETON: I don't want to  
4 misspeak. Yes, ma'am.

5 MS. SMITH: I have a question. Right  
6 now we're on an extended contract waiting for the  
7 one to be approved until the end of this  
8 re-proposal of this contract. In that re-proposal  
9 we requested three positions so that we can  
10 fulfill, but how do we show that on the RFP? Do we  
11 say -- I mean right now if you're -- say we want to  
12 add three positions to this program, so right as  
13 right now they're not filled, okay? But in our  
14 extended contract we put in there for those  
15 positions.

16 MS. SINGLETON: I'm sorry, do you  
17 currently hold a contract with the department?

18 MS. SMITH: Yes.

19 MS. SINGLETON: Oh, okay. All right.

20 MS. SMITH: So if the submission of the  
21 extended contract is approved, that gives us the

1 option to put those three people in that position.

2 MS. SINGLETON: What I suggest you do, I  
3 believe -- did everyone get a -- it's different  
4 columns, a green folder? All of the forms and  
5 everything that you need to fill out is in that  
6 folder, and we'll take down your question and get  
7 back to you on that.

8 Yes, sir.

9 MR. HOLLAND: My name is Almos Holland,  
10 Southern Maryland Tri-County Community Action. Is  
11 this procedure just for TCA recipients or is it for  
12 any hiring in the program now?

13 MS. SINGLETON: It's TCA recipients.

14 MR. HOLLAND: Just TCA?

15 MS. SINGLETON: Yes, sir. And from what  
16 I understand you would treat a TCA employee just  
17 like you would any of your other employees. I've  
18 been told if you have any disciplinary problems or  
19 something of that nature that you would notify the  
20 department. But once again I believe that  
21 information is in your packet, but if it isn't just

1 get back to Ms. Austin and she'll get the answer  
2 for you.

3 MR. HOLLAND: I guess how would you  
4 identify someone to be a TCA recipient, if someone  
5 is applying? I don't understand the process.

6 MS. SINGLETON: The best thing for us to  
7 do is for us to get back to you on that.

8 MR. HOLLAND: Okay.

9 MS. SINGLETON: We'll make sure you  
10 understand it.

11 MR. HOLLAND: Okay. Thank you.

12 MR. REDDITT: James Redditt from the  
13 procurement division. Just to give a little  
14 clarification on it, the purpose of the hiring  
15 agreement is really to help TCA customers to work  
16 their way off of the system, and what the agreement  
17 stipulates is that if you have a vacancy in your  
18 company, what you would do is you would send the  
19 specifications for that vacancy to Mr. Ingram's  
20 office. He would determine if there are any  
21 available TCA customers that can meet those

1 requirements for that position. They would send  
2 that person to your company to interview for the  
3 position. The hiring agreement said that you  
4 agreed to interview people for those positions;  
5 it's not, it does not say that you have to hire  
6 that person.

7 MS. SINGLETON: Exactly.

8 MR. REDDITT: You agree to interview  
9 those people for those positions. We would love  
10 for you to hire them, but it's an agreement that  
11 you agree to at least interview that TCA customer  
12 to allow them to have the opportunity to gain that  
13 position, and anytime you have a vacancy you send a  
14 fax to Mr. Ingram. If he has no TCA customers that  
15 can fill those specifications, he will notify you  
16 and then you're free to interview and hire whoever  
17 you like, but again, the hiring agreement is again  
18 mandated by law and once you sign that, anytime you  
19 have a vacancy, you want to get that information to  
20 Mr. Ingram because that is a requirement of your  
21 contract performance.

1 MS. SINGLETON: Thank you, James. Yes,  
2 ma'am.

3 MS. BALZ: Delilah Balz with Southern  
4 Maryland Tri-County Community Action. Would this  
5 apply for a temporary position? Is it any vacancy?

6 MS. AUSTIN: Full-time position. They  
7 are full time. They are full-time positions, that  
8 is stipulated in -- that is in your packet, these  
9 are full-time positions.

10 MS. SMITH: Deanie Smith from Washington  
11 County. The question is what's the turnaround on  
12 that? I mean is it several weeks we have to wait  
13 until we get a response or --

14 MR. REDDITT: I don't believe it's a  
15 long turnaround. I believe based upon where your  
16 region is we would only look at customers in that  
17 area that's available to fill that position. You  
18 wouldn't do like a statewide kind of announcement  
19 for something like that, but just for any TCA  
20 customers in your area that meet the qualifications  
21 for the job opening, so it shouldn't be a long



1     turnaround at all.

2                   MS. AUSTIN:  And if they don't meet the  
3     qualifications within three days you will receive a  
4     waiver which opens it up for you to hire anyone who  
5     completes after the three day-period.  You will  
6     receive that waiver by fax, normally it's faxed to  
7     them.  Are there any more questions regarding the  
8     hiring agreement?

9                   MS. BALZ:  Delilah Balz.  In the event  
10    of a vacancy would you submit that hiring agreement  
11    or contact DHR before you put out the vacancy  
12    announcement?

13                  MS. AUSTIN:  Yes, you do, and it's  
14    usually the job announcement, you know, when you  
15    have your job announcement, a receptionist, worker,  
16    you know.

17                  MS. BALZ:  But before you open it to the  
18    public?

19                  MS. AUSTIN:  Exactly.  It has to be  
20    before you open it to the public, and it's a waiver  
21    after the three-day period.  Thank you so much,

1 Ms. Balz.

2 We have some people who just came in. I  
3 would like for them to introduce themselves  
4 starting here on the right. If you could stand,  
5 give your name and your company.

6 MR. MARCHOL: I'm Jacques Marchol and  
7 I'm with Matrix Business Solutions.

8 MS. REESE: Good morning, I'm Vadie  
9 Reese with Matrix Business Solutions.

10 MS. ROBERTS: Good morning, Yvonne  
11 Roberts with Enterprise Business Technologies. We  
12 provide IT staffing and HR management services.

13 MR. ROBERTS: Good morning, everyone,  
14 I'm with Enterprise Business Technologies as well  
15 and of course we perform the same services that  
16 Yvonne just spoke about.

17 MS. AUSTIN: Right now we're going to  
18 talk about the MBE, the Minority Business  
19 Enterprise participation goal, which is in your  
20 RFP. Does every -- do you have a copy of the RFP?  
21 Okay. It will be in Section 2.37. No. Not.

1     2.31.   2.31.   I'm sorry.

2                   An MBE subcontract participation goal of  
3     1 percent of the total contract dollar amount has  
4     been established for this procurement. By  
5     submitting a response to this solicitation the  
6     offeror agrees that this dollar amount of the  
7     contract will be performed by certified Minority  
8     Business Enterprises. By submitting a response to  
9     this solicitation, the offeror agrees that these  
10    dollar amounts of the contract will be performed by  
11    certified Minority Business Enterprises as  
12    specified.

13                  A prime contractor, including an MBE  
14    prime contractor, must accomplish an amount of work  
15    not less than the MBE subcontract goal with  
16    certified MBE subcontractors. B, a prime  
17    contractor comprising a joint venture that includes  
18    MBE partners must accomplish the MBE subcontract  
19    goal with certified MBE subcontractors.

20                  Now, I believe everybody wants  
21    clarification on exactly what that means. When the

1 contract is awarded to you, whatever the amount is,  
2 1 percent of that amount must be committed to  
3 subcontractors for the MBE toward your MBE goal.  
4 Must be. And that is specified. Now let me go  
5 into the forms and other things that are required  
6 for MBE. Our MBE administrator was unable to come  
7 today, Ms. Donna Foster, so we're kind of winging  
8 this, right, Ralph?

9 MR. MARKUS: Right.

10 MS. AUSTIN: Who in here is familiar  
11 with the MBE process? MBE goal.

12 VENDOR REPRESENTATIVE: We are.

13 MS. AUSTIN: You are. Do we have MBEs  
14 in here? Certified.

15 (Hand raised.)

16 MS. AUSTIN: All right. Then you're  
17 very familiar with the process. Okay.

18 We're going to go through the RFP  
19 starting at Section 2.29 to explain the MBE  
20 procedure and goals. The Department of Human  
21 Resources is responsible for reporting procurement

1 activity with all Minority Business Enterprises,  
2 MBES, to the Governor's Office of Minority Affairs.  
3 Only those vendors who have been certified as an  
4 MBE by the Maryland Department of Transportation,  
5 MDOT, M-dot we call it, can be counted in this  
6 report. In order to fulfill the reporting  
7 responsibility it is requested that all offerors  
8 complete the Minority Business Enterprise Report,  
9 which is Attachment F -- does everyone have your  
10 attachments? You might want to look at the form to  
11 familiarize yourself with the form -- and return it  
12 as part of their proposal.

13 A nonprofit entity organized to promote  
14 the interest of the mentally or physically disabled  
15 and vendors who are at least 51 percent owned and  
16 controlled by one or more of the following  
17 categories meet the definition of MDOT  
18 certification: African Americans, American  
19 Indians, Hispanics, Asian Americans, women,  
20 physically or mentally disabled. Inquiry and/or  
21 application can be made directly to the Maryland

1 Department of Transportation Office of Minority  
2 Enterprise.

3           Section 2.30, participation. The  
4 offeror shall construct his procedures for the  
5 performance of the work required in this contract  
6 to attempt to achieve the Minority Business  
7 Enterprise goal stated in this request for  
8 proposals, which is 1 percent. MBE performance  
9 must be in accordance with this exhibit as  
10 authorized by Code of Maryland Regulations, COMAR,  
11 21.11.03. Contractor agrees to exercise all good  
12 faith efforts to carry out the requirements set  
13 forth in this exhibit.

14           Section 2.32. It gives the definitions  
15 of everything, but I want, if everyone can look  
16 over it to see if there's anything specific that  
17 you would want clarified, answered or answered  
18 later.

19           MR. MARKUS: If I can add just a  
20 comment, because these are organizations or  
21 companies certified by MDOT, MDOT's website does

1    have a way to look up companies, so if you're  
2    looking for a company to subcontract with, you can  
3    look them up to see if they're certified on MDOT's  
4    website.

5                   MS. AUSTIN:   Okay.

6                   MS. REESE:   Vadie Reese from Matrix  
7    Business Solutions.  Is there a particular NASDAQ  
8    code or any type of particular industry that you  
9    would like for the MBE company to be certified in  
10   for us to select them?  Or is it open to any  
11   certified MBE companies?

12                  MS. AUSTIN:   It's open to any certified  
13   MBE.

14                  MS. REESE:   Okay.  Thank you.

15                  MS. BALZ:    I have a question regarding  
16   Attachment F.  Delilah Balz.  This form is to be  
17   completed with information about our organization,  
18   the person, the entity applying for this contract?

19                  MS. AUSTIN:   Okay.  I'm looking at  
20   Attachment F.  It's the Minority Business  
21   Enterprise Report.  Mr. Redditt, I might need your

1 assistance here.

2 MR. REDDITT: Attachment F of the MBE  
3 report is filled out by the prime contractor, which  
4 is your agency. It's to allow the department to  
5 determine whether or not this contract is being  
6 awarded to an MBE firm or not. That form is not  
7 filled out by a subcontractor, it's only by the  
8 prime contractor.

9 MS. BALZ: With the information  
10 regarding the prime contractor?

11 MR. REDDITT: Correct. The thing with  
12 the MBE participation, we're tracking participation  
13 both for prime contractors as well as  
14 subcontractors, because the Governor's Office on  
15 Minority Affairs wants to track not only whether  
16 we're having subcontracts on our big contracts but  
17 whether or not we're offering MBE opportunities to  
18 prime contractors as well.

19 MR. MARKUS: If I could just comment,  
20 Attachment H is the attachment in which you would  
21 list the subcontractor, MBE subcontractors.



1                   MS. AUSTIN: Okay. Attachment H is the  
2 MBE participation schedule. Mr. Redditt, correct  
3 me if I'm wrong, I believe this is about to be  
4 revised? Some of the MBE forms?

5                   MR. REDDITT: They are currently being  
6 revised and the reason why they're being revised is  
7 because -- well, the purpose for why we're here  
8 today is because there were some issues regarding  
9 the completion of some of the MBE forms submitted  
10 with the original technical proposals, and what the  
11 Governor's Office of Minority Affairs as well as  
12 the Department of Budget and Management had  
13 informed us is that it is important to complete  
14 these forms properly because not completing these  
15 forms may cause your proposal to be deemed not  
16 responsive, and the reason why we're updating the  
17 forms is that we can show you a example of a  
18 completed certified MBE Utilization and Fair  
19 Solicitation Affidavit as well as a completed MBE  
20 participation schedule that should be completed  
21 with the technical proposals, and I'm not a hundred

1 percent certain but those may be sent out in the  
2 form of an amendment to the RFP following this  
3 preproposal conference.

4 MS. SMITH: I have a question. My name  
5 is Deanie Smith, I'm in Washington County, and out  
6 in western Maryland there isn't but one or two and  
7 they're actually farther out in like Garrett County  
8 and stuff as a minority business. In our area we  
9 don't have any. However, we have been talking to a  
10 few of our contractors and they have applied.  
11 However, when they contacted the Transportation  
12 Department they were informed it could take between  
13 three and nine months before they could get  
14 certified. We've had both of our -- the two that  
15 are applying that we do business with called me  
16 yesterday to inform me of that.

17 MS. AUSTIN: Okay. I wasn't aware of  
18 that. I've always heard this was a quicker  
19 process.

20 MS. SMITH: No. So I mean they're  
21 willing to take the steps but we're kind of stuck,

1 but the other question is too, if we list these,  
2 say we only have one in our area that we use --

3 MS. AUSTIN: Uh-huh.

4 MS. SMITH: -- but within the four years  
5 and what is it, three months or nine months,  
6 whatever, of the contract, we find more that we can  
7 use, what is the protocol for that? Do we need to  
8 contact you to say oh, we're going to add those to  
9 our list or --

10 MS. AUSTIN: Definitely. The contract  
11 would have to be modified and they would have to be  
12 added to your contract. You cannot just use an MBE  
13 contractor to meet your MBE goal. It has to be  
14 specified in your contract on the solicitation.

15 MS. SMITH: Because like I said,  
16 Washington County doesn't have any.

17 MS. AUSTIN: It can be added at a later  
18 date. Who do you have now as a certified MBE --

19 MS. SMITH: Pardon?

20 MS. AUSTIN: Who are you using now?

21 MS. SMITH: We don't have any, that's

1     why we're working with some of the vendors that we  
2     use, they are subcontractors, to get certified.  
3     The question to them -- I mean their problem is  
4     they're being told three to nine months to get  
5     certified.

6                   MS. AUSTIN: But they have applied?

7                   MS. SMITH: But they have applied.

8                   MS. AUSTIN: Okay. That's a question I  
9     can ask our MBE administrator some information  
10    regarding that. I will get back to you on that.  
11    Yes.

12                  MR. ROBERTS: Cosford Roberts,  
13    Enterprise Business Technologies. My question  
14    relates to 2.31 dealing with MBEs, Section B where  
15    we talk about prime contractors.

16                  MS. AUSTIN: Uh-huh.

17                  MR. ROBERTS: I notice that it allows  
18    for vendor joint venture. Is it permissible that  
19    two or three MBEs can, can join hands in --

20                  MS. AUSTIN: Yes, it is.

21                  MR. ROBERTS: -- going after the

1 contract?

2 MS. AUSTIN: Yes, it is possible.

3 MR. ROBERTS: Thanks. My second  
4 question is -- you probably have gone through this  
5 already, I don't know, but it's important that I  
6 ask. Sorry for being late.

7 MS. AUSTIN: No, we haven't.

8 MR. ROBERTS: It was stated earlier in  
9 the, in the RFP that an offeror might apply for a  
10 single jurisdiction.

11 MS. AUSTIN: Uh-huh.

12 MR. ROBERTS: And in another place it  
13 stated that you can do multiple applications.  
14 Which is the correct approach we're using? If you  
15 look under document with the key dates it says an  
16 offeror may submit proposals for more than one  
17 jurisdiction. We go down a little later in the  
18 RFP -- where that is? I think it's about 2.9 or  
19 thereabout. I will have to find that.

20 A PARTICIPANT: 2.9.

21 MR. ROBERTS: 2.9.

1                   A PARTICIPANT: Page 8.

2                   MR. ROBERTS: Yes, 2.8. It states that  
3 you might apply for only a single jurisdiction.  
4 Would you please clarify that?

5                   MS. AUSTIN: It is only one proposal per  
6 jurisdiction.

7                   MR. ROBERTS: Okay.

8                   MS. AUSTIN: One per jurisdiction.

9                   MR. ROBERTS: Okay.

10                  MS. AUSTIN: You can submit multiple  
11 proposals for St. Mary's, Charles, but they're all  
12 separate.

13                  MR. ROBERTS: Okay.

14                  MS. AUSTIN: They have to be separate  
15 entities. Each one will be individual, you can't  
16 have -- yeah. Mr. Redditt, did you --

17                  MR. REDDITT: Just to get a little  
18 clarification on Section 2.9, what that's saying is  
19 that if you're submitting a proposal for St. Mary's  
20 County, you can't submit more than one proposal for  
21 that county. What multiple proposals means is

1   you're proposing different ways for providing the  
2   same services and this RFP is not allowing that.  
3   You can have one proposal for as many jurisdictions  
4   as you like but only one proposal for each  
5   jurisdiction is allowed.

6                   MR. ROBERTS: Thank you. That clarifies  
7   it for me.

8                   MS. ROBERTS: Yvonne Roberts from  
9   Enterprise Business Technologies. Your requirement  
10   states that the prime contractor should have office  
11   within the county. Now, does that mean that the  
12   subcontractor, which might be an MBE, has to be,  
13   has to reside in that county also?

14                  MS. AUSTIN: This contract is with the  
15   prime.

16                  MS. ROBERTS: Right.

17                  MS. AUSTIN: Not the subcontractor.

18                  MS. ROBERTS: So the subcontractor can  
19   be from any --

20                  MS. AUSTIN: That is a question that  
21   might need to be submitted so we can get that from

1 the MBE administrator.

2 MS. ROBERTS: Okay.

3 MS. AUSTIN: Mr. Redditt, did you, did  
4 you hear the question? Ms. Singleton.

5 MS. SINGLETON: Elsa Singleton. As the  
6 prime contractor you supervise the subcontractor,  
7 so as long as that subcontractor meets the -- as  
8 long as you are meeting the requirements in the  
9 RFP, the subcontractor can be wherever, but it is  
10 your responsibility to supervise that  
11 subcontractor.

12 MS. ROBERTS: Okay.

13 MS. AUSTIN: Are there any more  
14 questions?

15 MR. ROBERTS: Can I go ahead with  
16 another one?

17 MS. AUSTIN: Sure.

18 MR. ROBERTS: Yes. It was stated that  
19 the prime would be required to maintain facilities  
20 in the jurisdiction. Does that mean --

21 MS. BALZ: Where is this?



1                   MR. ROBERTS: The section? I think it's  
2   2.11. It's not 2.11?

3                   MR. MARKUS: Yeah. No, it is. 2.11 is  
4   working hours and locations and it says offerors  
5   shall maintain the facility in the jurisdiction in  
6   which the offeror proposes to provide service.

7                   MR. ROBERTS: Yes. My question relates  
8   to whether the prime contractor is required to have  
9   those facilities in place prior to the proposal  
10  being submitted or is it after the contract has  
11  been awarded that you put those facilities in  
12  place?

13                  MR. MARKUS: It really, it can be at the  
14  time the contract starts. It should be at the  
15  time, by the time the contract would start, because  
16  this is a contract in which we're taking  
17  applications, the organization is taking  
18  applications, and we want to provide as best access  
19  as possible to the people of that jurisdiction, so  
20  we do want a facility to provide that access.

21                  MR. ROBERTS: Thank you.

1                   MR. MENIS: David Menis. At some point  
2 we are kind of saying jurisdiction and then later  
3 on in some of the attachments I see LAA, local  
4 administrative agency. Is it the same?

5                   MR. MARKUS: Well, the, the organization  
6 or company that wins the award is designated as the  
7 local administering agency.

8                   MR. MENIS: So it's contractor, right?

9                   MR. MARKUS: Right, that's the  
10 contractor.

11                  MR. MENIS: Or subcontractor, right?

12                  MR. MARKUS: Yes. Yes.

13                  MR. ROBERTS: Might I proceed with  
14 another question?

15                  MS. AUSTIN: Of course.

16                  MR. ROBERTS: In Section 2.13C on page 9  
17 a reference was made to the, the right to cancel a  
18 contract by the awarding agency, meaning DHR.

19                  MS. AUSTIN: That's correct.

20                  MR. ROBERTS: But should, should a  
21 contract be cancelled six weeks into, into, into

1 the award being made when the contractor has  
2 committed to a lease and put in the place labor  
3 commitments, are there any considerations to those  
4 applications?

5 MR. MARKUS: I think the answer is no  
6 and the reason for that is this is a program, both  
7 parts of the program, the Maryland Energy  
8 Assistance Program and the Electric Universal  
9 Service Program, and I'm going to get into that in  
10 a few moments, the Maryland Energy Assistance  
11 Program or MEAP is funded through the federal  
12 government, and the funding is not known for each  
13 year until that fiscal year begins. So we don't  
14 know ahead of time whether the program is going to  
15 continue or what the funding level will be.  
16 Similarly with the Electric Universal Service  
17 Program; at least part of that funding is more  
18 secure as it is in legislation on a permanent  
19 basis, but of course there's always the possibility  
20 that that legislation could be repealed. I mean I  
21 don't think that will happen, but it's within the

1 realm of possibilities.

2 MR. ROBERTS: Okay. So then in the  
3 initial stages then you probably would not actually  
4 make an award unless you have the funds?

5 MS. AUSTIN: Every contract with the  
6 state of Maryland has this clause in it. It is  
7 based on the, our funding stream, be it federal  
8 government, a local government, general funds, no  
9 matter where the pot of money is coming from.  
10 This -- our contract will stipulate if the funds  
11 are not there, then the contract cannot be  
12 continued and it will be terminated. This is  
13 standard language that is in all of our contracts.

14 MR. MARKUS: In this particular  
15 situation for this particular RFP, which would  
16 start, the award would start December 1st, by that  
17 time we will know whether we -- what funding we  
18 have from our federal agency, but we will only know  
19 that up through September 30th of 2010. We don't  
20 know what the funding would be beyond that.

21 MR. ROBERTS: Okay. Thanks. That

1 clarifies it.

2 MS. AUSTIN: Yes.

3 MS. BALZ: Delilah Balz. This is a  
4 question about what constitutes a year in this RFP.  
5 It says this contract would be for four years and  
6 seven months.

7 MS. AUSTIN: Uh-huh.

8 MS. BALZ: Would the seven months be the  
9 first --

10 MS. AUSTIN: First year. It's the first  
11 year.

12 MS. BALZ: Okay.

13 MS. AUSTIN: Yes, Mr. Menis.

14 MR. MENIS: David Menis. It was said  
15 that each location will have an intake worker who  
16 will take applications from applicants, and then it  
17 said that, you know, this particular person cannot  
18 certify or approve applications, that therefore  
19 should it be two people over there like intake  
20 worker and a kind of supervisor?

21 MR. MARKUS: It would -- some

1 accommodation would need to be made for that  
2 circumstance. In situations where one company may  
3 be submitting proposals for multiple counties, for  
4 example, all that would be needed would be an  
5 intake worker in one county and then a person who  
6 could certify it could be located in another  
7 location, another county or in a central office,  
8 but it would be within the same company.

9 MR. MENIS: So he will be a floater, he  
10 will just go from place to place as needed?

11 MR. MARKUS: Right. Or it could come to  
12 a central office in that case. But otherwise, yes,  
13 if you're just doing one county, then yes, you  
14 would need sufficient staff to perform all the  
15 functions.

16 MR. MENIS: Okay.

17 MS. REESE: Vadie Reese, Matrix Business  
18 Solutions. What's considered sufficient staff, how  
19 many staff representatives do you recommend?

20 MR. MARKUS: Well, I think that's what  
21 you need to determine as part of your proposal and

1 by reading this as far as what's required, the  
2 specifications, and -- well, we're going to go  
3 through that in a minute.

4 MS. REESE: Okay. Okay.

5 MS. AUSTIN: I have one more form that I  
6 want to talk about regarding MBE, which is the  
7 Attachment G, Certified MBE Utilization and Fair  
8 Solicitation Affidavit. This document is to be  
9 included with the bid or offer, which means it has  
10 to be returned at the same time that you submit  
11 your technical and financial proposal. If the  
12 bidder or offeror fails to submit this form with  
13 the bid or offer as required, the procurement  
14 officer shall deem the bid nonresponsive or shall  
15 determine that the offer is not reasonably  
16 susceptible of being selected for award. Okay.

17 In looking at this form, the first part  
18 of the section in conjunction with -- you fill out  
19 the top portion or the bottom portion. The bottom  
20 portion is considered the waiver information,  
21 you're requesting a waiver of the MBE goal. The

1 top portion is you are agreeing to fulfill the MBE  
2 goal, which in this case is 1 percent. Only one  
3 portion should be completed and returned with the  
4 proposals.

5 And -- question?

6 MS. BALZ: So number 1, it can be either  
7 the top section --

8 MS. AUSTIN: Yes.

9 MS. BALZ: -- or the bottom section?

10 MS. AUSTIN: Or the bottom section as it  
11 states on here. Section 1 --

12 MS. SMITH: So we are allowed -- I'm  
13 sorry, go ahead.

14 MS. AUSTIN: Okay.

15 MS. SMITH: Deanie Smith from Washington  
16 County. So we are allowed to request waivers?

17 MS. AUSTIN: You're allowed to request  
18 them, yes.

19 MS. SMITH: Okay. So if we do request  
20 it and even though we may not get the waiver, our  
21 RFP will not be kicked out? Is that what you just



1 stated?

2 MS. AUSTIN: If it is completed --

3 MS. SMITH: Correctly.

4 MS. AUSTIN: Correctly. Yes, Ms. Balz.

5 MS. BALZ: Any more insight on this form  
6 before I ask my question?

7 MR. MARKUS: I'll just add that there is  
8 a committee within the department that reviews  
9 those forms and any waiver requests and they would  
10 make the decision whether that waiver would be  
11 granted or not.

12 MS. AUSTIN: That's not our decision.

13 MR. MARKUS: Right. It's not our  
14 decision, and if anybody is familiar with the  
15 policy of the governor at this point, it's a high  
16 priority to have MBE goals and to meet those goals.

17 MS. BALZ: Delilah Balz. If you were to  
18 request a waiver, you would still need to submit  
19 Attachment H; is that correct? Which is the MBE  
20 participation schedule.

21 MS. AUSTIN: MBE participation schedule,

1     yes.

2                   MS. BALZ:   Showing that you --

3                   MS. SMITH:   Are at least trying.

4                   MS. AUSTIN:   Good faith.   It's called  
5     good-faith effort.   You are attempting or you have  
6     attempted to reach that goal.

7                   MS. BALZ:   Okay.   Now, I have another  
8     question regarding these MBE forms.

9                   MS. AUSTIN:   Sure.   Sure.

10                  MS. BALZ:   In Section 4.3 of the RFP  
11     forms --

12                  MS. AUSTIN:   Uh-huh.

13                  MS. BALZ:   -- it states that you must  
14     submit this MBE participation schedule.

15                  MS. AUSTIN:   Yes.

16                  MS. BALZ:   Another of the forms in this  
17     RFP, which is Attachment J, subcontractor, project  
18     participation statement, on the top of it it says  
19     you must submit one of these forms with each MBE  
20     listed on this schedule.

21                  MS. AUSTIN:   Yes.

1                   MS. BALZ: However, it does not say in  
2     the RFP that you must submit form -- Attachment J  
3     with the RFP. Do you or don't you?

4                   MS. AUSTIN: Okay. It is not submitted  
5     initially. Not at that time. I think we have some  
6     clarification in the back. Mr. Redditt and Ms.  
7     Singleton. Thank you so much.

8                   MR. REDDITT: With regards to the MBE  
9     participation schedule, when you're submitting the  
10    participation schedule for the RFP, when you're  
11    submitting your proposal and you're submitting the  
12    participation schedule with your proposal, you will  
13    not fill in the total contract amount. There's a  
14    blank on the form that says total contract amount;  
15    when you're submitting it for your proposal you  
16    will not put a dollar amount there, okay? If you  
17    are notified of contract award, you'll be requested  
18    to fill out another participation schedule. This  
19    time you will include the contract amount and you  
20    would include the dollar amount that each MBE will  
21    be responsible for under this contract, under the

1 contract performance. At that time you will send  
2 in the subcontractor participation schedule as well  
3 as the outreach efforts compliance form, but only  
4 after notification of award. You don't submit the  
5 subcontract participation schedule with your  
6 proposal.

7 MS. AUSTIN: Go ahead, Ms. Balz.

8 MS. BALZ: Okay. So on the MBE  
9 participation schedule would be the MBEs you have  
10 contacted or attempted to contact to see whether or  
11 not they would, will be able to bid?

12 MS. AUSTIN: Yes. Contacted. Yes.

13 MS. BALZ: Okay.

14 MS. AUSTIN: Any more questions? We are  
15 going to go on to specifications with Mr. Markus.

16 MR. MARKUS: Again, I'm Ralph Markus,  
17 director of the Office of Home Energy Programs, and  
18 we're going to take a look at Section 3,  
19 specifications. And the first section in 3.1 is  
20 the background, and we've already talked a little  
21 bit about that, but basically the first paragraph

1 really goes into the legislative background of the  
2 programs, but specifically the Maryland Energy  
3 Assistance Program or MEAP provides assistance once  
4 per year to eligible households and shelters to  
5 help with heating bills for gas, electric and all  
6 fossil fuels, and the purpose is to make bills more  
7 affordable. Under the Low Income Home Energy  
8 Assistance Program block grant, which is the  
9 funding source for MEAP, cooling assistance could  
10 also be provided as well as emergency assistance.

11 Now, currently right now Maryland does  
12 not provide specifically cooling assistance, but we  
13 do provide emergency assistance, not as a separate  
14 benefit but as a process, it's an expedited process  
15 of getting the benefit to the customer.

16 The Electric Universal Service Program  
17 or EUSP provide, also provides assistance once per  
18 year for ongoing electric expenses through a bill  
19 payment assistance component. So, in other words,  
20 it only, it's a benefit that is only used for  
21 electricity, whereas the MEAP grant is used for all

1 types of fuel.

2                   Let me -- there's two components to  
3 EUSP, one is the bill payment assistance and then  
4 the other is arrearage assistance, and here it  
5 states that arrearage is provided once in a  
6 lifetime. I'm going to make a correction to that  
7 because we just had a legislative change that now  
8 allows for arrearage assistance to be provided once  
9 every seven years. And one of the requirements of  
10 receiving assistance under EUSP is that there must  
11 be an electric bill in the applicant's name. Under  
12 the MEAP program the bill does not have to be in  
13 the applicant's name.

14                   The Utility Service Protection Program  
15 or USPP is actually a program between the Public  
16 Service Commission of Maryland and the utilities of  
17 Maryland, and our role in that is just to take the  
18 application for it, and it's a checkoff on our  
19 application form. There is no monetary benefit  
20 associated with USPP, it just provides certain  
21 protections for the customer if they fulfill

1 certain requirements.

2           Section 3.2 is the scope of this  
3 project, and as was mentioned earlier, the general  
4 purpose of this RFP is to provide the  
5 administrative work of taking and processing and  
6 paying benefits for customers in need of  
7 assistance, and that includes such things as  
8 outreach, there's an outreach component in which  
9 efforts are to be made to inform the public and the  
10 target population of the availability of  
11 assistance. As part of that our office does  
12 provide the application forms and brochures, but  
13 the contractor can provide any other kind of  
14 printed material. That's, you know, at your  
15 option, any other strategies for outreach.

16           Application intake, it's the process  
17 through which the contractors receive energy  
18 assistance applications from the public or  
19 nonprofit shelter providers, there's regulations  
20 for taking of applications. Basically it's up to  
21 you how those applications are taken. We do ask

1   that you do a mail-out of applications and we do  
2   provide a list of names through our database to  
3   mail out to previous recipients of assistance, so  
4   it can be done by mail, in-office, there is also an  
5   online application system at this time called SAIL,  
6   which stands for Service Access and Information  
7   Link, and that's available through the department's  
8   website and the specific website is  
9   www.md.sail.org.

10               Also as part of outreach and application  
11   intake you can go to other alternate locations and  
12   take applications, such as churches or community  
13   centers and that type of thing. The eligibility  
14   guidelines are spelled out here on page 28 and  
15   basically it's 175 percent of the poverty level,  
16   and the guidelines are slightly different between  
17   MEAP and EUSP.

18               All applications taken are entered into  
19   our database. We do have a software application  
20   program that's a centralized database, so no part  
21   of this RFP is to develop software, the software is



1 already there. And as a matter of fact this week  
2 it is going to be moved from being housed in this  
3 building to being housed with a contractor in  
4 Dallas, Texas, at their data center.

5               Part of the process, of the application  
6 process is if somebody submits an application and  
7 it's incomplete, that they are to be notified that  
8 it's incomplete and told what additional  
9 documentation is needed in order to complete the  
10 application. The contractor will review the  
11 applications for completeness and whether or not  
12 they fulfill the eligibility requirements and then  
13 certify those applications for a benefit, and all  
14 of that is done within our software program, all  
15 the eligibility requirements are built into it and  
16 so that it can be used for that purpose. The, the  
17 formula for calculating the benefits are also built  
18 into the software.

19               Skipping down to payment processing.  
20 Shelter applications, we have done shelters in the  
21 past. We are currently not doing shelters. But

1 that's not to say we won't do them in future years.

2 Payment processing. The paying of  
3 benefits is done twofold; one, the MEAP benefits  
4 that are paid to nonutility vendors, the oil  
5 companies, propane companies, and so on, those  
6 benefits are paid directly by the local agency or  
7 by the contractor. The utility payments are  
8 actually paid through our state central office.  
9 All the other processing of those applications is  
10 done through the database and then when they're  
11 ready for payment, when the utility applications  
12 are ready for payment, we process those payments at  
13 our office on a weekly basis.

14           As I mentioned, the MEAP Energy Crisis  
15   Service, item D on page 31 explains the criteria  
16   for that, and according to the situation the  
17   response time varies, but it is a requirement not  
18   just on our part but through our federal  
19   legislation that the emergency criteria be met in  
20   those situations.

21 And then eligibility notification, the

1 contractor is responsible for notifying the  
2 applicant whether they are eligible for a benefit  
3 and how much, or whether they have been denied and  
4 the reason for that denial, and again, that is  
5 processed through our software.

6           Item F is minimization of fraud. Every  
7 effort should be taken to minimize potential fraud  
8 in, among applicants, as well as within the, among  
9 the contractor. Linkages, it's important as part  
10 of the program to establish linkages with other  
11 community agencies and partners, particularly those  
12 that serve a similar target population. Again,  
13 this relates to outreach where it's important to  
14 provide as much access as possible to the target  
15 population. It's also within the realm of  
16 possibility that you can establish linkages with  
17 other organizations and have them help you take  
18 applications, provide some intake service. And  
19 then that, that could be determined on your part  
20 whether that would be -- whether you would provide  
21 any funds for them or whether they would do that on

1 a voluntary basis.

2           Fiscal reporting, there are certain  
3 fiscal reports, fiscal-related reports that are  
4 required, and those are listed out in Section 8 on  
5 page 32. And then similarly there's program  
6 reporting, there's a fuel consumption survey that's  
7 due at the end of the program year and that  
8 requires the contractor to contact a selected  
9 sample, and we provide the sample, of companies  
10 that have provided fuel to get certain pieces of  
11 information. So we, we provide the names of the  
12 company and the form that needs to be filled out  
13 and then the contractor goes out and contacts that  
14 company to have the form filled out. And then  
15 there's also a monthly outreach log. We track what  
16 outreach activities are done on a monthly basis by  
17 each contractor.

18           Ad hoc reports, occasionally there may  
19 be some other reports that we need. We do report  
20 information to our higher-ups here in the  
21 department as well as with the governor's office or

1 possibly through our federal partners, so from time  
2 to time there may be additional reports needed.

3                   And then monitoring. We do perform  
4 monitoring of the contractors on an annual basis.  
5 And this just specifies what is required as part of  
6 that process.

7                   Section 3.3 just lists the objectives of  
8 the program and you can read those. And then  
9 Section 3.4 are the requirements, and basically  
10 this tells you, it's a rehash of the  
11 specifications, but these are the things that do  
12 need to be included as part of RFP -- of the  
13 proposal that you submit, so make sure that you  
14 make mention of all of these items. So you can see  
15 here, the contractor shall perform the following  
16 activities, so you need to make sure that you  
17 mention that you will perform these activities, and  
18 it's outreach, application intake, eligibility  
19 determination, USPP participation, payment  
20 processing and so on.

21                   We do require at this point that the

1 contractor have access to the Internet. This is in  
2 order to be able to use our data system. We  
3 currently are using and moving to all of the  
4 agencies using a virtual private network access to  
5 our software application and that will require that  
6 you have Internet access in order to do that.

7           The rest of these items you can look at  
8 it, it's just the basic information about  
9 recordkeeping and fiscal recordkeeping and being  
10 able -- further down, number 8 addresses  
11 monitoring, when a monitor comes out you need to be  
12 able to accommodate them and then your facilities  
13 should be in compliance with American with  
14 Disabilities Act. And Section 3.5 are a listing of  
15 the deliverables and basically that's some of the  
16 reports or plans that are required. Some of these  
17 are on a monthly basis, some of them are just on an  
18 annual basis, and those are also part of the  
19 attachment as well. And then -- yes, Delilah.

20           MS. BALZ: On the deliverables, for  
21 example, reports that are due September 15th of

1 each year, since this contract wouldn't start until  
2 December, would this not need to be submitted?

3 MR. MARKUS: I believe what is required  
4 is that for those items, the outreach plan and the  
5 crisis plan, that would still need to be part of  
6 the proposal that you submit and then subsequent to  
7 that each year it would be submitted. You do have  
8 to identify and designate a contract manager,  
9 project manager, and there will be a post-award  
10 orientation conference to explain any additional  
11 details that are needed as part of winning the  
12 award.

13 I also wanted to just mention some  
14 other, other things. As part of the process of  
15 submitting your proposal to make sure that things  
16 are not overlooked, because this is a pretty thick  
17 document and it's very easy to miss things, and I  
18 just want to point out some things so we don't have  
19 to -- we're on a very strict time schedule for  
20 this, so I wanted to point out some things that  
21 sometimes are missed as part of a submission, and

1     just to start off with is your transmittal letter.  
2     There is a cover letter, transmittal letter, that  
3     is required as part of this process, and what we  
4     have found in the past is that there are some  
5     pieces of information missing from that transmittal  
6     letter, primarily your eMarylandMarketplace ID  
7     number. That should be included as part of that.

8             The questions that are being asked here,  
9     there's going to be an addendum developed that will  
10    be sent to each of you and you have to acknowledge  
11    receipt of that addendum. And then of course all  
12    your identifying information for your company.

13            One thing you do not want to put on your  
14    transmittal letter as well as what Mr. Redditt was  
15    talking about on the MBE forms is you do not want  
16    to put any financial information on that letter.  
17    And I think we'll talk about this later. All the  
18    financial information is going to be part of the  
19    financial proposal that's in a separate sealed  
20    envelope.

21            Make sure that, I just went over all the



1 specifications, make sure that your proposal  
2 includes a comment about everything that's listed  
3 in the specifications, everything. Even if it's  
4 just acknowledging it. But you have to, we have to  
5 know that you're aware of it in effect. Make sure  
6 you comment on any staff changes. There's a item  
7 in here that requires you to report any staff  
8 changes or movement of staff to our office within  
9 30 days of it happening to get our approval on  
10 that. So make sure that you acknowledge that.  
11 Make sure you include a table of organization. We  
12 have received proposals in the past that have left  
13 that out. These are types of things that we will  
14 then, if it's not included we will then have to ask  
15 you to submit it and that's going to take  
16 additional time.

17           Again, relating to personnel, make sure  
18 that it's clear whether the person, the personnel  
19 involved in this project are part time, full time  
20 or seasonal workers. And if you are already  
21 receiving, or if you already have a contract with

1 the state or multiple contracts with the state, you  
2 need to list all those contracts, and I think it  
3 spells out what information is needed as part of  
4 those contracts. Basically it's the agency that  
5 you have a contract with, the service that you're  
6 providing, the value of the contract, the term of  
7 the contract, who the state contact is. One of the  
8 things that we may use this for is to contact that  
9 agency and that person to see how the performance  
10 of that contract is going, and then also whether  
11 there's any renewable options on that contract or  
12 whether the contract is over.

13           And make sure, in the financial section  
14 make sure that you describe your financial process  
15 within your company as, you know, the payment of  
16 the benefits. Payment processing is a crucial  
17 piece of the pie. We want to be sure that your  
18 financial office is accountable and it has all the  
19 procedures in place that will assure  
20 accountability. And then finally, don't forget the  
21 MBE forms again. Very important. And let me just

1 show you, this, this is a copy -- these are our  
2 brochures for this year and our application form.  
3 And the brochures and applications, again, are  
4 provided by our office to the contractor. Debbie,  
5 back to you.

6 MS. AUSTIN: Okay.

7 MR. MENIS: Question.

8 MR. MARKUS: Yes, questions.

9 MR. MENIS: Okay. First of all you  
10 mentioned that, about the payments. Contractors  
11 are responsible for certain payments. How does it  
12 work, is it that reimbursement is a process between  
13 the head and the contractor or contractor using  
14 their own funds to make certain payments?

15 MR. MARKUS: No. Well, first on the  
16 administrative funds, this contract is just for  
17 administrative funds.

18 MR. MENIS: Okay.

19 MR. MARKUS: And the way that you  
20 receive the administrative funds is by invoicing  
21 our office. The benefit funds, we will provide an

1 allocation to you up front and then you will pay  
2 the benefits out of that allocation, and then --

3 MR. MENIS: Question number 2. I'm  
4 sorry. You just mentioned in outreach, right, it's  
5 going to be lots of mailing will be involved here,  
6 so you said that usually you provide a listing of  
7 all the possible recipients, so pretty much we will  
8 know number of piece of mail which has to be  
9 mailed, right? So therefore on our financial  
10 statement we'll have to, when you calculating all  
11 the expenses, right, and wouldn't know it will go  
12 up or it will go down later on in the budget, say a  
13 few months, few years, how do we have to apply  
14 as -- because you have to see, you know, like the  
15 price, final price and that should be included in  
16 it.

17 MR. MARKUS: Right.

18 MR. MENIS: It's valuable.

19 MR. MARKUS: The way that you can get an  
20 idea of the numbers is Attachment S shows the  
21 number of applications going back in time, actually

1 it goes all the way back to 2002.

2 MR. MENIS: Okay.

3 MR. MARKUS: So you can get an idea.  
4 I'm trying to see. Perhaps as part of the addendum  
5 we can provide the numbers for 2009, because that,  
6 when this was initially put out we didn't have the  
7 final numbers for 2009. So I think we can add that  
8 as part of the addendum that goes out.

9 MR. MENIS: One more question. About  
10 Internet, according to what I read here contractors  
11 shall provide an Internet access to the location.  
12 I mean it's pretty much on contractor. Contractor  
13 has to have -- well, you provide it with equipment  
14 and the contractor has an Internet access too so  
15 people can work on the equipment.

16 MR. MARKUS: Right.

17 MR. MENIS: So this should be a part of  
18 that financial kind of statement, right, that,  
19 whatever expenses related to maintaining the  
20 Internet access?

21 MR. MARKUS: That would be up to you.

1 MR. MENIS: Okay.

2 MR. MARKUS: Yes.

3 MS. ROBERTS: Yvonne Roberts from  
4 Enterprise Business Technologies. One of your  
5 requirements referred to minimization of fraud.  
6 Now, what verification processes are built into the  
7 database to flag potential fraud?

8 MR. MARKUS: One of the things that is  
9 built into the database is a report that will  
10 identify any duplicate payments.

11 MS. ROBERTS: Okay.

12 MR. MARKUS: Generally, as we mentioned,  
13 there's one benefit payment per year for an  
14 applicant. Occasionally due to certain  
15 circumstances there may be a change with that  
16 applicant and they will come back and ask for a  
17 change, for the benefit to be sent to another  
18 company, and in that case it's legitimate, but in  
19 other cases, you know, they may try to apply a  
20 second time. The primary check is when you enter  
21 an application on our database. You enter it using

1 the Social Security number first, and once you  
2 enter that Social Security number it's checked  
3 through the database to see if that person has  
4 applied before.

5 MR. ROBERTS: That year.

6 MR. MARKUS: That year, and it also  
7 checks to see if they've applied in past years. If  
8 they have not applied this year already but did  
9 apply a year ago or two years ago, it will bring  
10 the data up onto the screen from a couple of years  
11 ago. But a lot of things related to fraud are  
12 really going to have to be up to you all in  
13 reviewing the documentation to make sure that it  
14 looks authentic.

15 MS. ROBERTS: Okay.

16 MR. MARKUS: I think there's only so  
17 much that can be done within a software application  
18 in terms of fraud. Yes.

19 MR. HOLLAND: Almos Holland, Southern  
20 Maryland Tri-County Community Action. My question  
21 is in reference to determining part time, full time

1 and seasonal employees. How is that determined if  
2 you're doing multiple counties?

3 MR. MARKUS: I'm not sure that I fully  
4 understand.

5 MS. BALZ: Part time or full time, is  
6 that dependent on whether -- like in the budget if  
7 someone is 100 percent or 50 percent, is that how  
8 you determine full time or part time?

9 MR. MARKUS: Right. Yes.

10 MS. BALZ: Okay.

11 MR. MARKUS: How much time they spend on  
12 this particular project. I mean you may have  
13 somebody who is spending 50 percent of their time  
14 doing energy assistance and in your particular  
15 organization you may have, I don't know, let's say  
16 you have a housing program, they may be spending  
17 the other 50 percent on housing, so for our  
18 purposes, for purposes of this proposal, it would  
19 be 50 percent. Even though they may be a full-time  
20 employee of the agency.

21 MS. BALZ: And seasonal is, I mean



1     that's still part time, right?  Would you --

2                   MR. MARKUS:  Right.  I think on the  
3     forms it, I can't remember if it asks for the  
4     number of months that the person is going to be  
5     working.

6                   MR. HOLLAND:  Almos Holland, Southern  
7     Maryland Tri-County Community Action.  In the  
8     personnel section in your narrative, if you have  
9     part time in that section for the employee do you  
10    look for part time in the financial?

11                  MR. MARKUS:  Yes, sure.

12                  MR. HOLLAND:  But part time, like in  
13    your example you're doing 50 percent weatherization  
14    and then 50 percent in energy assistance, but if  
15    they're doing 100 percent in energy assistance and  
16    no other duties assigned they're 100 percent and  
17    they should be a hundred percent in the personnel  
18    section?

19                  MR. MARKUS:  Right.

20                  MR. HOLLAND:  And that doesn't classify  
21    them as full time if it just -- they're full time

1 in the program.

2 MR. MARKUS: Right. In that case they  
3 would be full time, yes.

4 MR. HOLLAND: It's just a little  
5 confusing.

6 MS. BALZ: So someone could be full time  
7 but only work 10 months?

8 MR. MARKUS: Right.

9 MR. ROBERTS: Cosford Roberts,  
10 Enterprise Business Technologies. My question  
11 relates to, to travel. In Attachment A reference  
12 was made to travel. I would be interested to know  
13 about the allowable travel rates, and secondly, I'm  
14 interested to know the degree of proactiveness that  
15 DHR anticipates in this program, because do you, do  
16 you go out to respond to people's needs or do they  
17 come to the facilities that you maintain in the  
18 main? It would be a part of a way of validating  
19 some of the claims, some of the applications that  
20 you would be dealing with.

21 MR. MARKUS: Yeah. The -- I don't

1 remember if in the body it lists the rates. I  
2 thought it did. Yeah, the allowable cost per mile  
3 is 55 cents, and the -- which is -- I don't know  
4 which page it's on. That was on page 3 of 7 of  
5 Attachment A it shows the 55 cents. In terms of  
6 the mileage it's really up to you. It's going to  
7 relate mostly to your outreach efforts. For the  
8 most part applicants are going to be coming to your  
9 facility as opposed to going out and -- it's rare  
10 but not unforeseeable that you would go out to an  
11 individual's home. You know, we do ask that if  
12 somebody really cannot complete an application in  
13 the office or by mail, you know, if they're  
14 disabled or something like that, that all  
15 accommodations be made to get that application, so  
16 it may require a visit to the home, although I  
17 would say that's relatively rare. Most  
18 applications are in-person in your facility or  
19 through the mail or in the case of outreach going  
20 to another facility and taking applications at  
21 another location. In, in some cases -- at this

1 point in time we provide our service through local  
2 Departments of Social Services in ten counties and  
3 the remaining counties are currently through other  
4 types of organizations, and sometimes those other  
5 organizations will go to the local Department of  
6 Social Services, you know, maybe one day a week or  
7 once a month or whatever it may be, you know, it's  
8 up to them to determine and work out and take  
9 applications at that location, or they may arrange  
10 with a church or a senior center to go to that  
11 location occasionally to take applications, so in  
12 those situations you may be incurring mileage.

13 MR. ROBERTS: Thank you.

14 MR. MENIS: I have a question. It's  
15 Attachment HH, page 57, denial of crisis  
16 assistance. How to prove that applicant has more  
17 than four days supplies in fuel or not facing,  
18 let's say, utility shutoff or furnace not working,  
19 people problem is all based on information provided  
20 by the applicant, but how can you eliminate  
21 possibility of fraud in that case? Does somebody

1 has to go and physically check it out?

2 MR. MARKUS: Okay. You at the agency do  
3 not have to go. In the case of utility shutoff,  
4 they would need to have a shutoff notice.

5 MR. MENIS: What about four-day supply?

6 MR. MARKUS: That is real -- you're  
7 going to have to take their word for it, and we  
8 know there may be some issues with that, but what  
9 you would do is you would contact their oil company  
10 and the oil company would go out.

11 MR. MENIS: I see.

12 MR. MARKUS: And they would later let  
13 you know if, if it was truly not an emergency.

14 MR. MENIS: I see. So, it's Attachment  
15 HH I'm talking about, page 57. So therefore it's  
16 pretty much based on the information provided by  
17 the applicant?

18 MR. MARKUS: Yes.

19 MR. MENIS: Okay.

20 MS. AUSTIN: Yes.

21 MS. ROBERTS: Now, the main focus of

1     this project really is to provide assistance with  
2     bill payment.

3                   MR. MARKUS:   Yes.

4                   MS. ROBERTS:  Is there a plan to link  
5     this or develop another project which will be the  
6     way energy conservation and retrofitting so as to  
7     reduce the bills that these participants incur?

8                   MR. MARKUS:  Yes.  But let me explain  
9     that.  As part of the application process there is  
10    a checkoff on here that says do you wish to be  
11    referred to the Weatherization Assistance Program,  
12    and we do coordinate with the Weatherization  
13    Assistance Program to provide referrals to them for  
14    weatherization/energy efficiency purposes.  Also in  
15    the case of a situation where someone's furnace is  
16    not working the referral would be made to the  
17    weatherization program.  That's actually something  
18    that we're in the process of revising somewhat  
19    because the weatherization program has received a  
20    large influx of recovery money, much to their  
21    happiness I think, they will be able to expand

1    their program significantly. We will also be  
2    working with the utilities as part of the Empower  
3    Maryland strategy where the utilities will also be  
4    doing a variety of energy efficiency projects in  
5    individual homes, and our clientele will receive  
6    those services for free from the utilities as well  
7    as the weatherization program, and one of the  
8    things that we're working on right now is revising  
9    our report on how we do referrals for  
10   weatherization purposes. Actually what I'm moving  
11   towards is providing direct access by the  
12   weatherization program so that they can run their  
13   own reports and our local contractors really won't  
14   have to do that anymore. But there will still need  
15   to be some partnerships involved.

16               MR. ROBERTS: That's a very, just a  
17   comment, very, very important part of the program,  
18   to provide those energy audits and retrofitting --

19               MR. MARKUS: Right.

20               MR. ROBERTS: -- to homes.

21               MR. MARKUS: Yeah. Well, the Empower

1 Maryland is a strategy that the governor is very  
2 interested in. I think, I know Baltimore Gas &  
3 Electric has already started their program and the  
4 other utilities are in various stages of the  
5 process of getting their programs approved through  
6 the Public Service Commission.

7 MS. BALZ: Delilah Balz. Is this the  
8 point where I should ask questions about the  
9 attachments or wait?

10 MS. AUSTIN: Not yet. We're getting  
11 ready to go into -- are you finished?

12 MR. MARKUS: I'm finished.

13 MS. AUSTIN: We're going into  
14 requirements for proposal preparation. Section 4,  
15 starting with 4.1 on page 38 of the RFP. This is  
16 the section, Ms. Balz. Section 4.1, transmittal  
17 letter. A transmittal letter prepared on a  
18 offeror's business stationery should accompany the  
19 proposal. The purpose of this letter is to  
20 transmit the proposal; therefore it should be  
21 brief. The letter shall contain the title of the



1 solicitation, include the offeror's name, federal  
2 tax identification or Social Security number,  
3 eMarylandMarketplace identification number and  
4 shall be signed by an individual who is authorized  
5 to bind the firm to all statements, including  
6 prices and services contained in the proposal. The  
7 letter shall also acknowledge any addenda to the  
8 RFP that had been received. An offeror shall be  
9 deemed to have accepted all the terms, conditions  
10 and requirements set forth in this RFP unless  
11 otherwise clearly noted as an attachment to the  
12 transmittal letter. A proposal that takes  
13 exception to these terms may be rejected.

14               We're going into the requirements for  
15 the proposal preparation. A proposal contains two  
16 volumes, a technical volume and a financial volume.  
17 Technical proposals are to be sealed separately  
18 from your financial proposal. Accompanying these  
19 two volumes is a transmittal letter, which I just  
20 explained. The technical proposal carries the  
21 greatest weight for the evaluation purposes. It

1 shall be organized and numbered in the same order  
2 as the requirements sections of the RFP. All pages  
3 shall be numbered. You should detail your overall  
4 understanding of the work and describe your  
5 organization's qualifications as well as those of  
6 key personnel who will be assigned to this project.  
7 You must also demonstrate your capacity to perform  
8 fully the contract requirements and the fiscal  
9 integrity to ensure good faith performance.  
10 Financial information should not be presented in  
11 any portion of the technical proposal, including  
12 the MBE participation statement. You are to use  
13 percentages only. Your financial proposal contains  
14 all direct and indirect costs associated with  
15 providing the services. This portion of the  
16 proposal is to be identified as the financial  
17 proposal and is to be bound and sealed separately  
18 from the technical proposal. We're asking that you  
19 not put your proposals in binders, they're just  
20 more cumbersome. Make sure all pages are numbered.  
21 You can clip them together, staple them, rubber

1 band them, but we request that you not put them in  
2 binders.

3           The forms that are to be submitted with  
4 the proposal, technical and financial proposal,  
5 which is on page 43 J, forms. Number 1, which is  
6 Attachment B, Bid/Proposal Affidavit. Number 2,  
7 Minority Business Enterprise forms. Attachment F,  
8 MBE Enterprise Report. Attachment G, certified MBE  
9 Utilization and Fair Solicitation Affidavit.  
10 Attachment H, MBE Participation Schedule. Next  
11 form would be the Certification Regarding Lobbying,  
12 Attachment O, and the Living Wage Affidavit of  
13 Agreement, which is Attachment Q. All these forms  
14 must be completed properly and signed. We already  
15 gave you information regarding the living wage.

16           Are there any questions regarding what's  
17 required to be sent in? Technical or financial  
18 proposals.

19           MS. BALZ: Delilah Balz. Under Section  
20 I, company literature.

21           MS. AUSTIN: Uh-huh.

1                   MS. BALZ: If we are resubmitting an  
2 application, is it necessary to resubmit all of the  
3 forms if there have been no changes?

4                   MS. AUSTIN: I'm not sure.

5                   MS. BALZ: I mean for example the  
6 audited financial statements -- yeah. I forget  
7 everything listed.

8                   MS. AUSTIN: I requested information  
9 regarding the reference letters. They were to be  
10 accepted, they were okay. Company literature. And  
11 the financial, what specific, which one  
12 specifically and then I need --

13                   MS. BALZ: Job descriptions, table of  
14 organization, list of contracts, letters of  
15 reference and audited financial statements.

16                   MS. AUSTIN: I'll have to get back to  
17 you. That is something that will be appearing at  
18 question and answer time, I'm not sure, table of  
19 organization.

20                   MS. BALZ: That's if there are no  
21 changes.

1 MR. MARKUS: Uh-huh.

2 MS. AUSTIN: At this point I'm saying I  
3 believe they will because what this is is a  
4 separate bid, this is a rebid and it's different,  
5 it's a different proposal. It's the same proposal  
6 but it is a different bid.

7 MS. BALZ: But the reference --

8 MS. AUSTIN: I will check. I'm not sure  
9 but I believe you should start preparing as though  
10 it's initially, you're doing it initially. I know  
11 it will be the same information but I believe  
12 you'll have to resubmit your information over  
13 again.

14 MS. BALZ: Okay. But you said the  
15 references --

16 MS. AUSTIN: The references are okay.  
17 That is okay, but the other information that you're  
18 saying, company literature, job descriptions, table  
19 of organization, list of contracts and audited  
20 financial statements, I'm going to have to check  
21 on.

1                   MS. SMITH: Deanie from Washington  
2 County, I just want to clarify this. The reference  
3 letters that we submitted with our first bid we do  
4 not have to do.

5                   MS. AUSTIN: Are okay, you do not have  
6 to resubmit. Yes.

7                   MS. ROBERTS: Okay. Along with your  
8 past performance where you list what are the  
9 contracts you have done and who are the contacts  
10 that you have there, those individuals should  
11 submit reference letters?

12                  MS. AUSTIN: No. No.

13                  MR. MARKUS: No.

14                  MS. AUSTIN: It's just the contract.

15                  MR. MARKUS: Just you as the proposer,  
16 as the offeror needs to submit reference letters, I  
17 think it's three reference letters.

18                  MS. AUSTIN: Three reference letters.

19                  MR. MARKUS: For your company.

20                  MS. ROBERTS: So the past performance is  
21 the same as what you're calling reference letters?

1 MS. AUSTIN: No, reference letters are  
2 something different. I'm not sure what you're  
3 referring to.

4 MR. MARKUS: If you have existing state  
5 contracts.

6 MS. ROBERTS: Right.

7 MR. MARKUS: We may, we as the  
8 evaluation panel has the option of contacting those  
9 agencies as a reference if they so choose. But  
10 it's separate from the reference, from the three  
11 reference letters.

12 MS. ROBERTS: Okay.

13 MR. HOLLAND: Southern Maryland  
14 Tri-County Community Action. The question is on  
15 page 3 it gives the date of Friday, July 24th but  
16 the 24th is on a Tuesday. Is it due that Tuesday  
17 or that Friday? Oh, I'm sorry, the 24th is a  
18 Friday.

19 MS. BALZ: But it says Tuesday.

20 MR. HOLLAND: But it says Tuesday in the  
21 RFP.

1                   MS. AUSTIN: That's going to be revised.  
2     If you go on the DHR Internet it has been changed,  
3     Friday, July 24. We're going to go over that  
4     before we leave today. Any other questions? We  
5     have one more section to go.

6                   MR. MARKUS: We have a different  
7     calendar in DHR.

8                   MS. AUSTIN: Definitely. Definitely a  
9     different calendar.

10                  Okay. Last, page 44, evaluation  
11     committee. Evaluation procedures. All offerors'  
12     proposals received by the closing deadline, which  
13     will be Friday, July 24th, will be evaluated by an  
14     evaluation committee established by the requesting  
15     state organization. The committee may request  
16     additional technical assistance from any source.  
17     Proposals will not be opened publicly but will be  
18     opened in the presence of at least two state  
19     employees. Proposals shall be held in a secure  
20     place until the established due date. After the  
21     due date a register of proposals shall be prepared



1     that identifies each offeror. The register of  
2     proposals shall be open to public inspection after  
3     award of the contract. Proposals shall be shown  
4     only to members of the evaluation committee or  
5     state employee having a legitimate interest in  
6     them.

7                     Section 5.3, qualifying proposals.  
8     Qualifying proposals are those proposals received  
9     from responsible offerors that are initially  
10    classified by the procurement officer as reasonably  
11    susceptible of being selected for award. Vendors  
12    whose technical proposals are not accepted will be  
13    notified in writing and the financial proposal will  
14    be returned unopened. Yes.

15                    MS. REESE: Vadie Reese, Matrix Business  
16    Solutions. The counties that are not listed here,  
17    have they already been awarded?

18                    MS. AUSTIN: They're in the process.  
19    They're being evaluated at this point.

20                    MS. REESE: Okay.

21                    MR. MARKUS: The final award has not

1     been done yet but they are in the process.

2                   MS. REESE:   Okay.

3                   MS. AUSTIN:   Okay.   We're going on to  
4     Section 5.4, the criteria for technical evaluation.  
5     All proposals that are judged -- not judged to be  
6     susceptible for award will be excluded from further  
7     consideration in the awarding of the contract and  
8     the financial proposal will be returned unopened.  
9     Any oral presentations shall occur as part of the  
10    technical evaluation.   The technical evaluation  
11    criteria that will be used for this solicitation  
12    will be qualifications, Section 4.3A; understanding  
13    the problem 4.3B; proposed service, Section 4.3C;  
14    assigned personnel, Section 4.3D; references, that  
15    is three business references that are to be sent to  
16    the procurement officer in a sealed envelope,  
17    Section 4.3E; financial responsibility, Section  
18    4.3F; and economic benefit to the state, Section  
19    4.3G.

20                   Section 5, financial evaluation.   The  
21    separate price volume of each qualifying proposal

1 will be distributed to the committee following the  
2 completion of the technical evaluation. The  
3 committee will establish the grand total price of  
4 each proposal in order to establish a financial  
5 ranking of the proposals from lowest to highest  
6 grand total price as submitted on Attachment A,  
7 Financial Proposal Form.

8           5.6, best and final offers. When it is  
9 deemed in the best interest of the state the  
10 procurement officer may permit qualified offerors  
11 to revise their initial financial proposal by  
12 submitting a best and final offer. The procurement  
13 officer shall notify each qualified offeror of the  
14 scope of the requested best and final offer and  
15 shall establish a date and time for their  
16 submission. The procurement officer may require  
17 more than one series of best and final offers and  
18 discussions if the agency head or designee makes a  
19 determination that it is in the state's best  
20 interest to do so. If more than one best and final  
21 offer is requested, an offeror's immediate previous

1 offer shall be construed as its best and final  
2 offer unless the offeror submits a timely notice of  
3 withdrawal or another best and final offer. The  
4 procurement officer may consult with and seek the  
5 recommendation of the evaluation committee during  
6 the best and final offer process. The state  
7 reserves the right to award the contract without  
8 issuing a BAFO, which is the best and final offer,  
9 if it is determined to be in the best interest of  
10 the state. And you can read Section 5.7, which is  
11 about debriefing, and 5.8, final evaluation of  
12 recommendation for award.

13           Upon completion of all discussions and  
14 negotiations, reference checks and site visits, if  
15 any, the procurement officer will recommend award  
16 of the contract to the responsible offeror whose  
17 proposal is determined to be the most advantageous  
18 to the state considering technical evaluation  
19 factors and price factors as set forth in this RFP.  
20 In making the most advantageous offeror  
21 determination, technical factors will be given

1 greater weight than price factors. Contract award,  
2 if any, resulting from the RFP is subject to  
3 appropriate state approvals. Awards exceeding  
4 \$200,000 require approval of the State Board of  
5 Public Works.

6 I'm going to go back to Section 1.5,  
7 closing date. Original, to be so identified, and  
8 five copies of each proposal, technical and  
9 financial, shall arrive to the procurement officer  
10 by 3:30 p.m. Eastern Daylight Time Friday, July  
11 24th, in order to be considered. Offerors mailing  
12 proposals shall allow sufficient mail delivery time  
13 to ensure timely receipt by the procurement  
14 officer. Proposals or unsolicited amendments to  
15 proposals arriving after the closing date end time  
16 will not be considered. Proposals may not be  
17 submitted by e-mail or facsimile. Are there any  
18 questions? Yes.

19 MR. MENIS: David Menis. We sent out  
20 proposal which gets stuck in waiting room for quite  
21 a while, so the question is is hand delivery

1 possible or not?

2 MS. AUSTIN: Definitely. Yes. Usually  
3 when you hand deliver them here someone meets you  
4 at the front desk and I will come down and give you  
5 a receipt or someone from the procurement  
6 department. Some FedEx to me, overnight delivery,  
7 we've had them all. Yes.

8 MR. HOLLAND: Almos Holland, Southern  
9 Maryland Tri-County Community Action. The question  
10 is for multiple jurisdictions will the best and  
11 final offer be on each jurisdiction or will it be a  
12 combination of all three?

13 MS. AUSTIN: It will be on each  
14 jurisdiction.

15 MS. BALZ: Delilah Balz. The best and  
16 final offer, how is the final dollar amount  
17 determined and could you go over this section  
18 again?

19 MS. AUSTIN: Which one?

20 MS. BALZ: Best and final offer,  
21 especially when it comes to if more than one best

1 and final offer is requested, that would come from  
2 the --

3 MR. MARKUS: Well, basically what  
4 happens is the evaluation committee, once they're  
5 done with the technical part of the proposal, will  
6 then open the financial part, the financial section  
7 and look at those and make a determination as to  
8 whether they were appropriate, reasonable, and if  
9 they feel that there is room for adjustment, they  
10 will request to, to Debbie in this case to send out  
11 a letter asking for a best and final offer, and so  
12 that gives the offeror an opportunity to revise  
13 their financial proposal. Now, they can either  
14 lower it, they can keep it the same or I guess they  
15 can even increase it.

16 MS. AUSTIN: Yes, they can. Yes, they  
17 can.

18 MR. MARKUS: You know, depending on the  
19 situation, what their thinking is.

20 MS. BALZ: And then what happens  
21 after --

1                   MR. MARKUS: Then it's submitted back,  
2 the committee will review it and then make a  
3 determination whether to award or not award.

4                   MS. AUSTIN: And the evaluation  
5 committee makes the determination. They also rank  
6 the information that is received and prices, as it  
7 says, the technical proposal has greater weight  
8 than the financial.

9                   MR. MARKUS: Right.

10                  MS. AUSTIN: And that is always to be  
11 considered.

12                  MR. MARKUS: Right. And what can happen  
13 is, you know, assuming there is a, more than one  
14 proposal per jurisdiction, depending on the best  
15 and final offer, you know, one company may come in  
16 lower than another company or may have a better  
17 value. So that's what needs to be considered from  
18 your standpoint.

19                  MS. BALZ: From our -- I mean if you're  
20 doing a budget for three different jurisdictions,  
21 in mind that you're going to operate a program for



1 a separate jurisdiction, of course the budget is  
2 going to be different than if you look at all three  
3 together when we're talking about best and final  
4 offer. I mean -- so --

5 MS. AUSTIN: But that's why they have to  
6 be separate. If -- let's say if you're doing St.  
7 Mary's County versus I guess a small county, the  
8 difference in the price, what the difference in the  
9 price will be, in the personnel, whatever is  
10 needed.

11 MS. BALZ: Delilah Balz. I guess what  
12 I'm saying is if you are offered a contract for all  
13 three jurisdictions, at that point -- I mean if, if  
14 of course when you are submitting the RFP you would  
15 have to do a budget for each of the three  
16 jurisdictions, but if you reached the point where  
17 you are being offered, you know, to the point give  
18 us your best and final offer for the three  
19 jurisdictions, perhaps that might be the point  
20 where it might be viewed as combine the three, you  
21 can't do that.

1 MS. AUSTIN: No. You can't do that.

2 MR. MARKUS: I understand that this does  
3 create an issue.

4 MS. AUSTIN: I understand. I  
5 understand.

6 MR. MARKUS: In preparing a proposal.  
7 Right. If you know you're going to be awarded all  
8 three you could probably do it for less than if you  
9 are just awarded for one out of the three, for  
10 example. I'm not sure how to really respond to  
11 that other than you just have to submit the  
12 proposal as you see fit.

13 MS. SMITH: Deanie Smith from Washington  
14 County. With the questions that were asked here  
15 that you need to get answers, how long will it be  
16 before we get the answers and will we be notified  
17 of when it's posted on the website, or on eMaryland  
18 Market?

19 MS. AUSTIN: It will be posted on both  
20 of them. As soon as we receive all the questions,  
21 as we said, we have a very tight schedule here, I

1     don't even believe I have a date that the questions  
2     are due.

3                   MR. MARKUS:   The 15th.

4                   MR. ROBERTS:   The 15th.

5                   MR. MARKUS:   The last day for questions  
6     is the 15th.

7                   MS. AUSTIN:   Which is next week.

8                   MR. MARKUS:   That's Wednesday.

9                   MS. AUSTIN:   Right.  As soon as we  
10    receive -- number one, we have to receive all the  
11    questions and they also have to go to our Attorney  
12    General's Office, the AG's office.  Before anything  
13    can be sent out on any website here, any questions  
14    have to be gone over by our Attorney General's  
15    office.  I would say within a week we're going to  
16    have it and that's after --

17                   MS. SMITH:   The due date.

18                   MS. AUSTIN:   You're absolutely right.  I  
19    just said we had a very tight -- okay.

20                   MR. MARKUS:   Extremely tight.

21                   MS. AUSTIN:   Extremely tight.  Okay,

1     it's very hard to give a date. Let me say, it will  
2     be as soon as possible, believe me. We, they  
3     understand we're on a very tight schedule right  
4     now. I'm hoping a couple of days but that's  
5     usually not the case, but.

6                 MS. SMITH: So, but --

7                 MS. AUSTIN: We can't say when because  
8     we don't know. We have to get approval before  
9     anything goes out publicly.

10                MS. SMITH: But you will notify us.

11                MS. AUSTIN: Oh, yes, I will notify you  
12     individually. That's why I need to make sure I  
13     have all your e-mails, telephone numbers, cards. I  
14     think we can contact people, yeah.

15                MR. ROBERTS: Cosford Roberts,  
16     Enterprise Business Technologies. Is there a  
17     standard that has been established by DHR as to the  
18     cost per dollar for delivery of services of this  
19     nature? Is there an established amount?

20                MR. MARKUS: No, there is not.

21                MS. ROBERTS: Yvonne Roberts. Was this

1 program ever operated in-house and if yes, what was  
2 the staff complement like?

3 MR. MARKUS: No, it's always been  
4 operated by local contractors.

5 MS. ROBERTS: Oh, okay.

6 MR. ROBERTS: And do you have --

7 MR. MARKUS: Go ahead.

8 MR. ROBERTS: Do you have online data  
9 available as to, apart from what is provided in the  
10 RFP on the spreadsheets as to what it really costs  
11 you?

12 MR. MARKUS: The only data that's online  
13 right now is data through StateStat, the Maryland  
14 StateStat Program, and it is accessible to the  
15 public. I don't know what the website address is  
16 though offhand.

17 MR. ROBERTS: Okay.

18 MR. MARKUS: I don't recall if it's  
19 accessible through the DHR website, but I believe  
20 it's accessible through the governor's website and  
21 that can give you an idea of expenditure, some

1 expenditures are on that at least for part of the  
2 year. I don't know how up to date it is because we  
3 don't post that particular piece of information,  
4 their office does that.

5 MR. ROBERTS: Okay. Thank you.

6 MS. AUSTIN: Yes.

7 MR. MENIS: David Menis. Attachment HH,  
8 page 6-V, local grievance requirements, it says  
9 that, you know, we have to, employers or  
10 contractors we have to be able to register all  
11 grievances, have kind of grievance log. The  
12 question is is the current system equipped with a  
13 program which will allow enter all the differences  
14 in the system and all the results or all the  
15 appeals or whatever else, results of the hearings?

16 MR. MARKUS: No, there's no software  
17 application that does that, that's something that  
18 would have to be done basically on a manual basis.

19 MR. MENIS: A manual basis, okay.

20 MR. MARKUS: Let me, let me follow up  
21 back to the previous question about the financial

1     and administrative costs. I will say that under  
2     our federal block grant we are limited in total to  
3     10 percent of our total allocation which can be  
4     used for administration, so we do, there are limits  
5     on that.

6                   MR. HOLLAND: Almos Holland, Southern  
7     Maryland Tri-County Community Action Committee. I  
8     have two questions. The 10 percent you just  
9     referred to, in looking at the financial and  
10    knowing the growing needs of -- or not the growing  
11    needs but the growing demand of customers who are  
12    needing assistance, is that looked upon when you  
13    look at your staffing? Because five people could  
14    have did it maybe five or six years back but now  
15    you're doing a lot more applications so your budget  
16    is going to look a little bit more beefed up, so I  
17    don't know if that's something that is considered  
18    when looking at the finance. I didn't even know if  
19    it's a question that could be answered today but I  
20    just thought I'd ask.

21                   MR. MARKUS: I'm not even sure that it

1 can be adequately answered. You know, of course  
2 there is a realization that the caseloads have been  
3 increasing in recent years, particularly  
4 dramatically over the last couple of years, and so  
5 I, I would say yes, it is taken into consideration,  
6 but the other part of it is we do have limits on  
7 what we can spend for administration.

8 MR. HOLLAND: The other question is the  
9 turnaround time for the answers to the questions,  
10 especially about the MBE, because that's a very  
11 important section. Let's say we get it the day,  
12 the answer to the questions the day before, will  
13 some consideration be taken into effect so that we  
14 can be on time with the RFP now that we've got our  
15 questions answered? Because I know it was a lot of  
16 RFP -- I mean MBE questions that needed some  
17 clearance on, and I don't know if we get the answer  
18 at the last minute how will that be handled?

19 MS. AUSTIN: If there are -- okay.  
20 Let's -- specific MBE questions after this session  
21 is over I will be willing to --



1                   MR. HOLLAND: Help us through.

2                   MS. AUSTIN: Help you look over it,  
3    yeah, and an MBE administrator or someone from the  
4    office, if real specific, real definite questions,  
5    if you have something you need help with. That's  
6    what we're here for. We're trying to make this  
7    process as painless as possible. Yes.

8                   MS. BALZ: Perhaps if you have time you  
9    might be able to share with us the areas that seem  
10   to need attention in the MBE form, which are  
11   probably common errors.

12                  MS. AUSTIN: Yes. Yes. I can do that.  
13   Are there any other questions regarding any parts  
14   of the RFP?

15                  MS. BALZ: Delilah Balz. Okay. We are  
16   reapplying. If we do not get the contract how much  
17   time will there be for a transition and who will  
18   pay for it? I mean --

19                  MR. MARKUS: The --

20                  MS. BALZ: Anybody, you know, how does  
21   the transition take place?

1                   MS. SMITH: They walk in, they take  
2 everything and you go okay.

3                   MR. MARKUS: Basically that's it. I  
4 mean our office would put together a transition  
5 plan. Your particular agency, since you already  
6 have a contract, you're only obligated to provide  
7 service until the term of that contract is up.  
8 Beyond that there's nothing required by your  
9 organization.

10                  MS. AUSTIN: Okay. Once again to go  
11 over the closing date. Closing date, an original  
12 to be identified and five copies of each proposal,  
13 technical and financial, shall arrive to the  
14 procurement officer by 3:30 p.m. Eastern Daylight  
15 time Friday, July 24th, in order to be considered.  
16 Proposals may not be submitted by e-mail or  
17 facsimile machine.

18                  A copy of the minutes and questions and  
19 answers to the questions answered here today will  
20 be published on eMarylandMarketplace and the DHR  
21 website as soon as possible. You can call myself,

1 I was going to say Mr. Markus, but myself for any  
2 additional information. All questions are to be  
3 submitted by Wednesday, July 15th. You can do that  
4 by telephone or e-mailing myself.

5 Are there any other questions? Thank  
6 you so much for coming. And thank you for doing  
7 business with the state of Maryland.

8 (Proceedings concluded at 11:50 a.m.)

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2 STATE OF MARYLAND  
3 COUNTY OF CARROLL

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4 I, Sharon A. Beaty, a Notary Public in  
5 and for the State of Maryland, County of Carroll,  
6 do hereby certify that the foregoing is a true and  
7 accurate transcript of the proceedings indicated.

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10 Sharon A. Beaty, Notary Public

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